The Contradiction of Desperation: Western Energy Schizophrenia, the Sinking of Russian Tankers, and the Road to World War III

— A Follow-Up to "The Strategic Dividend of Chaos" (March 6, 2026)

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April, 4, 2026

***Abstract*—This article extends the analysis presented in "The Strategic Dividend of Chaos" (March 6, 2026), which documented Russian gains from the US-Israeli war against Iran and predicted the subsequent trajectory of the conflict. All major predictions of that article have been empirically confirmed through March 2026. Here we identify and analyze a new, deeply contradictory development in Western strategy: the simultaneous *lifting of sanctions* on Russian energy exports and the *covert, illegal sinking of Russian oil tankers* in international waters. We argue that this schizophrenia is not a sign of Western incoherence but a desperate tactical adaptation aimed at achieving two incompatible goals: (1) increasing global oil supply to suppress prices and harm Russian revenues, while (2) strangling Chinese access to Russian crude by disrupting maritime transport routes. This strategy, however, is self-defeating and extremely dangerous. It has already been identified by Russian and Chinese strategic planners as an act of hybrid warfare that crosses multiple red lines. We posit that the tanker-sinking campaign—conducted with plausible deniability but unmistakable state sponsorship—represents the most serious escalation since the Iran war began, and carries a non-negligible probability of triggering a direct NATO-Russia or even US-China confrontation, i.e., World War III. The article concludes by contrasting this lethal reality with the algorithmic amplification of confusionist figures like Jiang Xueqin, whose content functions to demobilize public attention precisely when clear-sighted analysis is most needed.**

***Index Terms*—Energy war, tanker sinking, sanctions, Russia, China, hybrid warfare, escalation, World War III, confusionism, Jiang Xueqin, spectacle, Wertkritik.**

I. Introduction: The March 6 Framework and Its Predictive Success

On March 6, 2026, this author released "The Strategic Dividend of Chaos: An Analysis of Russian Gains from the 2026 Iran War" [1]. Grounded in the critique of value (Wertkritik), the concept of dissociation (Wert-Abspaltung), and Debord's theory of the spectacle, the article made a series of falsifiable predictions regarding the economic, military-strategic, diplomatic, and ideological dimensions of the conflict. As documented in the companion follow-up "The Spectacle of Confirmation" [2], every major prediction has been validated by events through March 2026: Russian energy revenues surged by $5–6 billion per month; Patriot interceptor depletion degraded Ukrainian air defense; Russia's strategic hedging deepened ties with Gulf states; Western moral authority eroded across the Global South; and the liberal spectacle began to rupture.

Yet the situation is not static. As the conflict enters its second month, new dynamics have emerged that were only incipient in early March. The most alarming of these is a profound contradiction in Western energy policy: the simultaneous *relaxation of formal sanctions* on Russian oil exports, coupled with a covert, plausibly deniable campaign of *sinking Russian oil tankers* in international waters.

At first glance, this appears irrational. Why would the US and its allies lift sanctions—allowing more Russian oil onto global markets—only to physically destroy the vessels carrying that oil? The answer, we argue, lies in a desperate two-front strategy: (1) increase the *total volume* of oil available to suppress global prices and thereby reduce Russian per-barrel revenue; while (2) selectively disrupt the specific maritime routes that supply *China*, Russia's most important energy customer. This strategy is an attempt to decouple the price effect from the geopolitical effect—to let Russian oil flow to India, Turkey, and Europe while blocking it from reaching Chinese ports.

We demonstrate that this strategy is not only failing but is actively pushing the world toward a direct confrontation between nuclear powers. Russian and Chinese strategic planners have identified the tanker-sinking campaign as an act of state-sponsored maritime terrorism. Moscow has already issued formal warnings, and Beijing has quietly redeployed naval assets to escort tankers in the Indian Ocean. The risk of a miscalculated engagement—a Chinese warship confronting a Western special forces team, or a Russian missile striking a NATO vessel under false flag—is now higher than at any point since the Cuban Missile Crisis.

This article proceeds in six sections. Section II documents the contradictory Western energy policy: the lifting of sanctions alongside the tanker-sinking campaign. Section III analyzes the strategic logic behind the contradiction: price suppression combined with China strangulation. Section IV examines the Russian and Chinese responses, which treat the tanker sinkings as a casus belli. Section V assesses the escala-

tion risks, concluding that World War III is a real possibility. Section VI contrasts this lethal dynamic with the algorithmic amplification of confusionist figures like Jiang Xueqin, whose content diverts public attention from the actual drivers of escalation. Section VII concludes with policy implications.

II. The Contradiction: Lifting Sanctions While Sinking Tankers

A. The Formal Sanctions Regime: A Partial Rollback

Following the outbreak of the Iran war on February 28, 2026, and the subsequent surge in global energy prices, Western capitals faced an acute dilemma. The G7 price cap on Russian oil, instituted in December 2022, had been effective in reducing Russian revenues while keeping oil flowing to global markets. However, the combined effect of Iranian supply removal (approximately 1.5 million barrels per day) and the closure of the Strait of Hormuz (affecting 20–30% of global oil trade) had overwhelmed the price-cap mechanism. By March 10, Urals crude was trading at $68 per barrel—well above the $60 cap—making the cap largely symbolic.

In response, the US Treasury's Office of Foreign Assets Control (OFAC) issued a series of general licenses in mid-to-late March that effectively *lifted sanctions enforcement* on a wide range of Russian energy transactions [4]. Specifically:

- **March 15, 2026:** OFAC General License 78 authorized transactions related to Russian oil exports to India, Turkey, and several African nations, provided the oil was priced at or below a revised cap of $75 per barrel (a de facto recognition that the old cap was unworkable).
- **March 22, 2026:** License 80 extended the authorization to European buyers, allowing EU member states to resume purchases of Russian crude and refined products without penalty until June 30, 2026.
- **March 28, 2026:** The G7 issued a joint statement "temporarily suspending" the price-cap enforcement mechanism, citing "extraordinary global energy supply disruptions" [5].

These measures were publicly justified as necessary to prevent a global recession. Privately, Western officials acknowledged that the sanctions regime had collapsed under the weight of the Iran conflict. As one senior US Treasury official anonymously told the *Financial Times*: "We can't afford to keep Russian oil off the market right now. The price spike would be catastrophic for our allies and for the global economy" [6].

By April 1, 2026, Russian oil exports had increased by approximately 12% compared to pre-war February levels, with the additional volumes flowing primarily to India, Turkey, and—crucially—Europe [7]. The formal sanctions architecture remained in place, but its enforcement had been gutted.

B. The Covert Tanker-Sinking Campaign

Simultaneously with this formal relaxation, a covert campaign of *sinking Russian oil tankers* has been documented by open-source intelligence and confirmed by multiple government sources speaking on condition of anonymity. Beginning in the second week of March, four Russian-flagged or Russian-operated tankers have been attacked and sunk in international waters:

1) **March 12, 2026:** The *NS Century*, a 115,000 dwt Aframax tanker carrying 700,000 barrels of Urals crude from Novorossiysk to Mumbai, was struck by an explosion in the Arabian Sea approximately 200 nautical miles off the coast of Oman. The vessel sank within 48 hours. All crew were rescued. Initial reports cited a "floating mine," but no mines had been reported in the area [8].
2) **March 18, 2026:** The *Ocean Amur*, a VLCC (Very Large Crude Carrier) transporting 2 million barrels of Russian ESPO crude from Kozmino to Qingdao, China, suffered a catastrophic hull breach in the South China Sea. Satellite imagery showed the vessel breaking in two. Chinese and Vietnamese rescue operations recovered 14 crew; 8 remain missing. The official investigation has been inconclusive, but multiple intelligence sources have pointed to a limpet mine attack by divers [9].
3) **March 24, 2026:** The *Baltic Star*, a medium-range tanker carrying diesel from Primorsk to Lagos, was sunk off the coast of Somalia. Unidentified fast boats approached the vessel; an explosion followed. Piracy was initially suspected, but no ransom demand was made [10].
4) **March 29, 2026:** The *Siberian Prosperity*, carrying 1 million barrels of Urals to China via the Cape of Good Hope (avoiding the Suez Canal due to regional instability), was hit by what appears to have been a ship-launched missile while transiting the Mozambique Channel. The vessel sank within hours. Three crew members were killed [11].

These four sinkings represent a loss of approximately 4 million barrels of Russian crude—a fraction of total exports, but strategically significant. More important than the volume is the *pattern*: three of the four tankers were destined for China, and the fourth was heading to India (a major Chinese competitor for oil but also a key node in Russian-Indian energy relations).

C. Evidence of State Sponsorship

No government has claimed responsibility for these attacks. However, multiple lines of evidence point toward Western intelligence agencies—specifically a joint US-UK-Israeli task force operating under naval special warfare authorities:

- **Operational signature:** The attacks employ techniques consistent with Western special forces: limpet mines, diver-delivered explosives, and precision missile strikes. They are beyond the capability of non-state actors in the regions involved.
- **Intelligence footprint:** Communications intercepts reported by *The Guardian* and *Der Spiegel* indicate that Western intelligence agencies had real-time tracking of the targeted vessels [12].

- **Plausible deniability:** The attacks are structured to be deniable—attributed to mines, pirates, or accidents. This is a hallmark of covert action.
- **Strategic alignment:** The attacks directly serve Western strategic objectives: disrupting Russian oil flows to China without formally declaring war.

On April 2, 2026, Russian Foreign Minister Sergey Lavrov publicly accused "certain NATO members" of conducting "state-sponsored maritime terrorism" against Russian civilian vessels [13]. The US State Department denied any involvement, calling Lavrov's claims "baseless and provocative." No independent investigation has been permitted.

III. The Strategic Logic: Price Suppression and China Strangulation

At first glance, the Western strategy appears internally contradictory. Lifting sanctions increases Russian oil exports, which should increase Russian revenues. Sinking tankers decreases exports, which should decrease Russian revenues. Why do both?

The answer lies in the *targeting pattern*. The tanker sinkings are not indiscriminate; they are concentrated on vessels destined for **China**. The formal sanctions relaxation, meanwhile, primarily benefits **non-Chinese** buyers (India, Turkey, Europe). The net effect is to:

1) **Increase total global supply** (by allowing more Russian oil to reach India, Turkey, and Europe), thereby suppressing the global benchmark price and reducing the per-barrel revenue Russia receives from *all* exports.
2) **Disrupt the specific supply chain to China**, forcing Beijing to pay higher prices for alternative sources (e.g., Saudi, Iraqi, or US oil) or to accept reduced volumes.

This is a classic *dual-use* economic warfare strategy: use the price mechanism to hurt Russia's overall revenue while using physical interdiction to hurt China's energy security. The two measures are designed to work in tandem.

A. The Price-Suppression Mechanism

Global oil prices are set at the margin. The difference between a tight market (price $90/bbl) and a balanced market (price $70/bbl) can be as little as 1–2 million barrels per day of additional supply. By allowing Russian oil that was previously sanctioned (and thus effectively off the market) to flow to India and Turkey, the US adds approximately 1 million barrels per day to global supply. This has helped keep Brent crude from exceeding $85/bbl, despite the loss of Iranian oil [7].

Every dollar per barrel reduction in the global price costs Russia approximately $150 million per month in lost revenue. The price suppression effect is real and significant.

B. The China-Strangulation Mechanism

China is the world's largest oil importer, and Russia has become its largest single supplier, providing approximately 2.2 million barrels per day in early 2026 (about 18% of Chinese imports) [14]. Most of this oil travels by sea from Russia's Far Eastern ports (Kozmino, De-Kastri) and from the Baltic via the Suez route.

The tanker-sinking campaign directly threatens this supply line. Chinese state-owned shipping companies have already begun rerouting vessels away from high-risk areas, increasing transit times and costs. More importantly, the attacks send a signal: *Chinese-bound Russian oil is a legitimate target*.

Beijing faces a difficult choice. It can:

- Accept higher costs and risks for Russian oil, potentially passing those costs to Chinese consumers;
- Reduce Russian imports and replace them with more expensive or geopolitically compromised alternatives (e.g., Saudi oil priced in US dollars, or Iranian oil that is also under threat);
- Escort its tankers with naval assets, risking direct confrontation with Western forces.

As of April 1, China has chosen the third option, deploying two destroyers and a replenishment ship to the Indian Ocean to escort Russian-flagged tankers destined for Chinese ports [15]. This is a significant escalation.

C. Why This Strategy Is Desperate—and Self-Defeating

The Western strategy rests on the assumption that Russia and China will accept the new arrangement passively. This assumption is false. Moscow and Beijing have already coordinated a response that directly challenges the logic of the strategy.

First, Russia has announced that it will reroute oil originally destined for China through the *Eastern Siberia–Pacific Ocean (ESPO) pipeline*, which delivers crude directly to Chinese refineries without maritime transport [16]. The pipeline's capacity is limited (approximately 600,000 bpd), but it provides a secure alternative for a fraction of the volume.

Second, Russia has threatened to impose a "security fee" on all oil shipped through high-risk areas, payable to private military companies that would provide armed escorts. This would effectively legitimize the presence of Wagner-style forces in international shipping lanes [17].

Third, and most dangerously, China has issued a formal diplomatic note stating that attacks on vessels carrying Russian oil to China will be considered "a threat to China's energy security" and that China reserves the right to "take all necessary measures" to protect its supply lines [18]. This is the language of a potential casus belli.

The Western strategy is self-defeating because it creates a direct incentive for Russia and China to *deepen their military coordination*—exactly the outcome the West claims to want to avoid.

IV. Russian and Chinese Responses: The Red Lines

A. Moscow's Calculus

Russia views the tanker-sinking campaign as an act of hybrid warfare that crosses a qualitative threshold. Unlike sanctions, which are within the bounds of economic competition, the physical destruction of civilian vessels in international

waters is an act of war under the UN Convention on the Law of the Sea (UNCLOS) and customary international law.

The Kremlin's response has been calibrated but unmistakable:

- **Diplomatic:** Lavrov's April 2 statement explicitly reserved the right to "take measures to protect Russian vessels and citizens, including military measures, in accordance with international law" [13]. This is a threat of military escort.
- **Military:** Russia has redeployed two frigates from its Black Sea Fleet to the Indian Ocean, ostensibly for "anti-piracy operations." Their actual mission is to escort tankers [19].
- **Economic:** Russia has announced that it will no longer honor existing oil contracts with any company whose home government is found to be involved in the attacks. This is a threat to weaponize supply.

Crucially, Moscow has not yet responded with direct kinetic action against Western vessels. The red line, as communicated through back channels, is the sinking of a *third* tanker destined for China [20]. After the sinking of the *Siberian Prosperity* on March 29, that line has been crossed.

B. Beijing's Calculus

China's position is even more consequential. Unlike Russia, China is not a belligerent in any ongoing war. It has maintained formal neutrality in both the Ukraine conflict and the Iran war. However, China's energy security is its Achilles' heel: approximately 70% of its oil imports pass through the Indian Ocean and the South China Sea.

The tanker sinkings represent a direct challenge to China's core interests. Beijing's response has been swift:

- **Naval deployment:** As noted, two Type 052D destroyers and a Type 901 replenishment ship have been dispatched to the Indian Ocean. These vessels are equipped with HQ-9 surface-to-air missiles and YJ-18 anti-ship cruise missiles. They are not merely symbolic.
- **Diplomatic offensive:** China has called for an emergency session of the UN Security Council to investigate the sinkings. The session, scheduled for April 10, will likely be blocked by the US and its allies, further escalating tensions.
- **Parallel energy deals:** China has accelerated negotiations with Saudi Arabia and the UAE for oil priced in renminbi, reducing its exposure to dollar-denominated markets and to disruptions in Russian supply [21].

The most dangerous development is the potential for a direct US-China naval encounter. Chinese warships escorting Russian tankers, and US/UK special forces operating from submarines or fast boats, could easily blunder into a confrontation. Rules of engagement in such a scenario are undefined. A single misidentified vessel, a single nervous captain, a single communication failure could trigger an exchange of fire.

V. Escalation Dynamics: The Path to World War III

The risk of a general war—involving NATO, Russia, and China—is no longer theoretical. It is a concrete possibility that strategic planners in Washington, Moscow, and Beijing are actively gaming.

A. The Escalation Ladder

The current situation occupies a dangerous rung on the escalation ladder:

1) **Stage 1 (current):** Covert attacks on Russian tankers; Russian diplomatic protests; Chinese naval escorts.
2) **Stage 2 (imminent):** Russian military escorts. If a Russian warship detects a Western submarine or fast boat preparing to attack a tanker, what are its orders? Current rules of engagement likely authorize warning shots, but escalation to lethal force is only a political decision away.
3) **Stage 3 (likely within weeks):** A direct engagement. The most plausible scenario: a Chinese destroyer uses its sonar to force a Western submarine to surface; the submarine refuses; the destroyer drops depth charges; the submarine fires a torpedo in self-defense. Within hours, both sides are at war.
4) **Stage 4 (possible):** Article 5 invocation. If a US or UK vessel is sunk by Russian or Chinese fire, NATO would be compelled to invoke Article 5, triggering a full-scale war between nuclear-armed alliances.
5) **Stage 5 (catastrophic):** Nuclear escalation. Once conventional war breaks out between nuclear powers, the risk of nuclear use—whether by design, miscalculation, or escalation dominance—becomes non-zero.

B. Why This Is Different from Previous Crises

The Cold War was managed by a set of established rules of engagement, communication hotlines, and mutual understanding of red lines. Those mechanisms have atrophied. The Ukraine war has already demonstrated Russia's willingness to take extreme risks. The Iran war has demonstrated the US's willingness to act unilaterally. The tanker war adds a new domain—maritime interdiction—where rules are unclear and escalation is rapid.

Moreover, this crisis involves three nuclear powers (US, Russia, China) with no direct communication channel between Washington and Beijing equivalent to the Moscow-Washington hotline. A miscalculation in the Indian Ocean could spiral before any leader can intervene.

C. The Role of Plausible Deniability

The Western strategy relies on plausible deniability. As long as no government claims responsibility, Russia and China cannot formally declare war without proof. This is a classic gray-zone tactic.

However, plausible deniability is a double-edged sword. It also means that if Russia or China responds with force against a Western vessel—sinking a US submarine that it *suspects* of

attacking a tanker—the West cannot easily escalate without admitting its own covert actions. The fog of war becomes a weapon for both sides.

VI. The Confusionist Distraction: Jiang Xueqin and the Spectacle

As the world drifts toward a potential world war, public attention is being systematically diverted by confusionist content. The most prominent example is Jiang Xueqin, the Chinese-Canadian "Nostradamus" whose vague, deterministic predictions have been amplified across YouTube, X, and independent media.

As argued in the companion article "The Spectacle of Prediction" [3], Jiang's content functions to *demobilize* audiences. His invocation of inescapable "traps" and historical "patterns" produces fatalism: if the future is already written, there is nothing to be done. This is precisely the message that the spectacle needs in a moment of crisis.

Consider the contrast:

- **Jiang's audience** is told that the US will inevitably lose, that China will inevitably rise, that individuals are powerless before the sweep of history. They watch, they nod, they do nothing.
- **The reality** is that the US, Russia, and China are engaged in a high-stakes game of maritime brinkmanship that could explode into world war. There is nothing inevitable about the outcome. It will be determined by decisions made in the coming weeks—decisions that can be influenced by informed public pressure.

The algorithmic amplification of Jiang and the shadowbanning of genuine analysis (including the March 6 article) is not a conspiracy. It is a structural feature of the spectacle. The spectacle cannot afford for audiences to understand the real dynamics of power, because that understanding might lead to action. So it elevates the false prophet who closes the future, and suppresses the analyst who opens it.

A. What Is to Be Done?

For readers who have followed this analysis to this point, the implication is clear: **do not be distracted**. Jiang's content is entertainment, not analysis. The real story is the tanker war, the risk of naval confrontation, and the desperate, self-defeating Western strategy of trying to strangle China while avoiding open war.

Demand that your governments:

- Disclose any involvement in the tanker sinkings;
- Establish clear rules of engagement to avoid naval clashes;
- Open direct communication channels with Beijing and Moscow;
- Pursue diplomatic solutions to the energy crisis rather than covert warfare.

The future is not written. It is being written now, by the decisions of a small number of people in Washington, Moscow, and Beijing. Those decisions can be influenced. But only if the public is informed—and not sedated by the spectacle.

VII. Conclusion: The Most Dangerous Moment Since 1962

The simultaneous lifting of sanctions and sinking of Russian tankers represents a profound strategic contradiction—one born of desperation. The West wants to suppress global oil prices to hurt Russian revenue, but also wants to strangle China's energy supply. It cannot do both without risking a direct confrontation with nuclear-armed powers.

We have entered the most dangerous moment in international politics since the Cuban Missile Crisis. The mechanisms that prevented escalation during the Cold War—clear red lines, established communication channels, mutual recognition of the catastrophic consequences of war—are absent or degraded. The tanker war is being fought in the gray zone, but the gray zone has a habit of turning black.

The March 6 article predicted that Russia would benefit from the Iran war. That prediction has been confirmed. This follow-up adds a new, darker prediction: **unless the tanker-sinking campaign ceases immediately and Western governments revert to conventional diplomacy, the world will experience a direct military confrontation between nuclear powers before June 2026**.

This is not alarmism. It is an analytical conclusion derived from the logic of the situation. The only remaining uncertainty is whether that confrontation remains limited (a single naval engagement, quickly contained) or escalates to general war.

The choice is not inevitable. But the window for choice is closing.

Postscript

As of April 6, 2026, the March 6 article remains shadowbanned. Jiang Xueqin's latest video—"The Final Trap: Why World War III Cannot Happen"—has 1.2 million views. The spectacle continues. The tankers continue to sail. The submarines continue to hunt.

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